August 2026

LEHIGH VALLEY COMMUNITY FOUNDATION

# CAUSE CONNECTION

Connecting people who care to causes that matter

## Make-A-Will Month: A Time to Think About Your Legacy

August is Make-A-Will Month, a timely reminder to create a will—or review an existing one to make sure it still reflects your wishes, your family, and the causes that matter most to you. A will is more than a legal document. It is a way to provide for the people you care about and express the values you hope will endure. For many people, philanthropy is an important part of that legacy.

### Passing Along More Than Assets

A charitable bequest does not have to be complicated or reserved for people with extraordinary wealth. You can leave a specific amount, a percentage of your estate, or name a charitable organization or fund as a beneficiary of a retirement account, life insurance policy, or other financial account.


Much has been written about the Great Wealth Transfer, but estate planning is about more than passing along assets. It is also an opportunity to pass along values. A charitable gift can tell future generations: These are the causes and communities I cared about, and I wanted my support to continue.

For donors and fundholders of the Lehigh Valley Community Foundation, a legacy gift can be especially flexible. You may choose to add to an existing fund, establish a new fund through your estate, support specific organizations or causes, or create a permanent charitable resource that can respond to changing community needs over time.

### Turn Your Intentions Into a Lasting Legacy

If your estate plan includes more complex assets or charitable strategies, the Community Foundation can also work alongside you and your professional advisors to explore options that align with your goals. If you do not yet have a will, Make-A-Will Month is a good reason to put one in place. If you already have one, consider whether it still reflects your life today.

And as you review your plans, ask yourself one more question: What do you want your generosity to make possible after your lifetime? A bequest or other planned gift to the Lehigh Valley Community Foundation can help carry your values forward and strengthen the community for generations to come.

## Collective Grantmaking Snapshot

### For June and July 2026

This bi-monthly snapshot reflects the collective impact of donor-advised and other charitable funds at LVCF, supporting trusted organizations.

- $2.8 million awarded through 199 grants to 146 nonprofit organizations
- 31% of total grant dollars provided as general operating/ flexible support

**Top Issue Areas by Dollars Granted**

- Human Services: $1,024,000
- Community and Economic Development: $597,381
- Health: $358,242

**Top Issue Areas by Number of Grants**

- Human Services: 69 grants
- Community & Economic Development: 28 grants
- Arts, Culture, and Creative Economy: 22 grants

**Nearly 58% of grant dollars stayed local in the Lehigh Valley**


# Give Year-End Generosity a Head Start

**The takeaway: Beginning your year-end planning early can help you give more thoughtfully and put charitable resources in place to support nonprofits when the time is right.**

**What is "bunching"?** Bunching means making one larger charitable contribution now, often for tax-planning purposes, to cover several years of anticipated giving. Through a donor-advised fund, you can then recommend grants to nonprofits over the next few years, effectively combining several years of charitable contributions into one contribution today.

For a nonprofit, a well-timed grant can make all the difference, helping to:

- Hire a program coordinator instead of postponing the position
- Expand a vital service for families
- Respond quickly when an unexpected need arises.

**That kind of support often begins with donors who plan ahead.** Imagine that each December, you make gifts to several organizations you care about. This year, instead of waiting for the rush of the final weeks, you begin the conversation now. With guidance from your tax and financial advisors, you decide to contribute several years of anticipated giving to a donor-advised fund at the community foundation. You may receive a charitable deduction in the year of the contribution, subject to applicable limitations. In the years ahead, you can recommend grants based on nonprofits' current needs, changing community circumstances, and the impact you hope to make.

**Flexible Giving, Greater Impact**

The funds are set aside for charitable purposes, giving you the flexibility to recommend a larger grant when an opportunity arises, respond to an urgent need, or provide steady annual support to organizations important to you. The result is more than a potentially tax-efficient gift. It is a charitable resource that allows you to approach future grantmaking with greater intention and respond when your support can make a meaningful difference.

Year-end may feel far away, but the best giving decisions rarely happen at the last minute. Talk with your advisors now, and include the community foundation team in the conversation. Together, we can help turn your year-end generosity into lasting community impact.





## LVCF Welcomes Four Business Leaders to its Board of Governors

LVCF recently appointed four accomplished business and community leaders to its Board of Governors: **Michael J. Fischer**, president and CEO of Client 1st Financial (top left); **Michael S. Keim**, president of Univest Bank and Trust Co. (top right); **Mark D. Myslinski**, sole proprietor of LaurelWey Consulting, LLC (lower left); and **Brian T. Regan**, director of tax services for RLB Accountants, P.C. (lower right).

"Michael Fischer, Michael Keim, Mark Myslinski and Brian Regan bring an exceptional breadth of financial, executive, governance, and community experience to the Foundation," said **Erika Riddle Petrozelli, CPA, CAP®**, president and CEO of the Lehigh Valley Community Foundation. "Their expertise and strong commitment to the Lehigh Valley will help guide our work as we steward charitable resources, engage donors and address important community needs."

Learn more...